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HOW TO USE THE NEW MEMBER FORM WITH THE ADDITION OF THE CRM MODULE

This should probably be titled the New Member Form for Proposed and Potential New Members. This form is basically sent to people who have been approved by the club for membership.

First you need to go to the My Club tab and click on the New Member Form on the left column
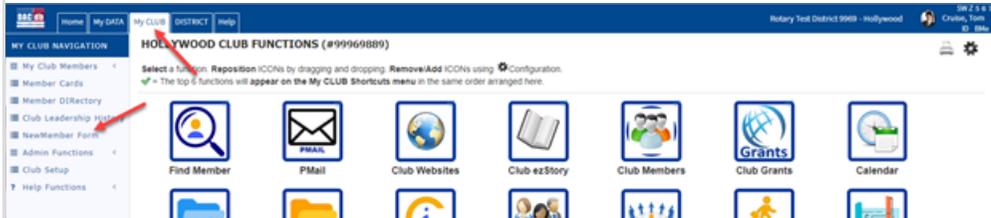
Next you click on the Email Proposed Member on the top left.
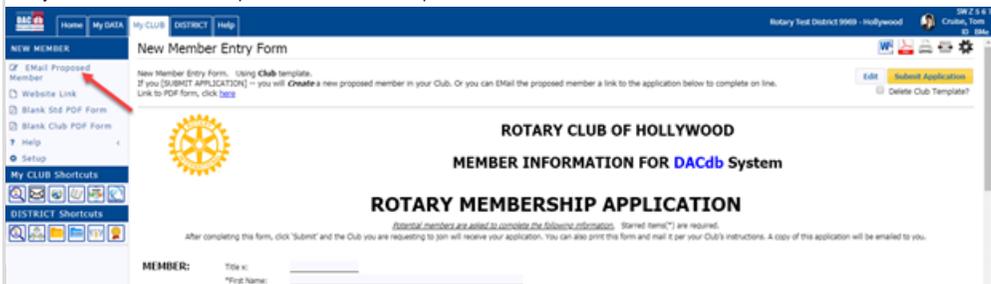
You now need two pieces of information if this is a person who is not in the CRM module. You need their first name and their email address. If they are in the CRM module, then you just need to type at least part of their last name to have the information entered in the body of the Pmail correctly. The major reason for this change is that if the club is using the CRM module, they are already in the system and it was causing an issue with creating two new members.

Now when the proposed or potential member receives the email and when the click on here, they will open up the new member from. When they finish filling it out and submit it, the secretary will receive and email that this has been sent and there will be a new Proposed tab on the top of the club member list.

All Club members are listed under one of the three tabs below based on their MemberTypes or Terminated status.
Club Leaders can be added (or removed) to this display, by turning them on using the configure ICON at the top right and the "Show Club Officers" to Yes (or No).

Edit PHF/SM   Add New Member   Edit Club
Submit Attendance

#	☑	Action	Member Name	⇕	Member Type	⇕	Club Position	⇕	Home Phone	⇕	Office Phone	⇕	Cell Phone	⇕	EMail	⇕
1	☑	✎✗📱📇👤		🔒	Active											
2	☑	✎✗📱📇👤		🔒	Active		Treasurer						1			

Active/Honorary Members   Other Members   Proposed   Potential Satellite Members   Terminated Members

Then you will need to click on the proposed new member's pencil and make some edits

Active/Honorary Members   Other Members   Proposed   Potential Satellite Members   Terminated Members

#	☑	Action	Member Name	⇕	Member Type	⇕	Terminated Date	⇕	Terminated Reason	⇕	Death Date	⇕
1	☑	✎✗📱📇👤📋			Proposed							

Now when the member is inducted, you just need to click on the Proposed tab and click on the pencil of the proposed member. Then on the information page that comes up, you change the member type from Proposed to Active, put in the start date (which cannot be more then 30 days). It is also a good idea to click on the Contact tab and make sure the email address and address information is correct and that the preferred email and address are selected.

Member Admin: John Depp id=800693583
D-9969 Hollywood (#99969889)

The RI Interface is set to OFF. Any changes you make here will made in DACdb but will not be updated in RI.
If you want your changes to be sent to RI, please setup the integration, by following the instructions found here.

Cancel   Terminate   Update

Member   Photo   Contact   Spouse   Business   PData   Club   Login   Alumni   ...   CLI   RLI   Log

Member Information:

Rotary ID: 0   Also known as "MemberID"
Member Type:* Proposed ▼   (Change Proposed to Active — 1)
Prefix: ▼
First Name:* John
Middle Name:
Last Name:* Depp
Suffix:
Previous Name: Former Name or Maiden   (Put in start date and can't be more than 30 days old)
Gender: Male ▼

Badge Information:
Badge/Nick Name: (Only put in a Badge Name if...)
Badge Title: Title you want to appear on Event Badges
Badge Number:

Other Information:
Start Date: (mm/dd/yyyy) Admission/Start Date in this Club! (2)
If there are previous years in another club, enter those years under the Club Tab
Birth Date: (mm/dd{/yyyy}) - year optional, but necessary for calculating the club's demographics correctly
Note: The DOB year, if entered, is only visible to the member and the few club officers who can edit member info, to all others it is hidden.

Member Data Correct?
What is this?

No Photo

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This will now move the member over to the Active/Honorary tab on the club and move them into the Member Compare on the RI Integration page. It is highly recommended that you go in on this page a day or two later and make sure that this person has rolled up to RI and is on the list in alphabetical order.